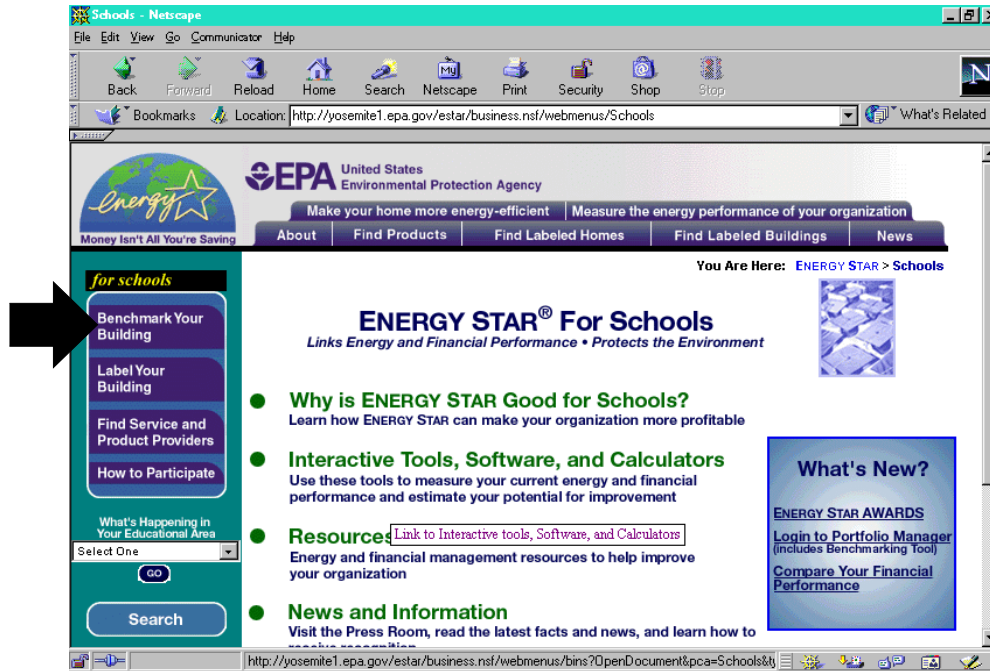
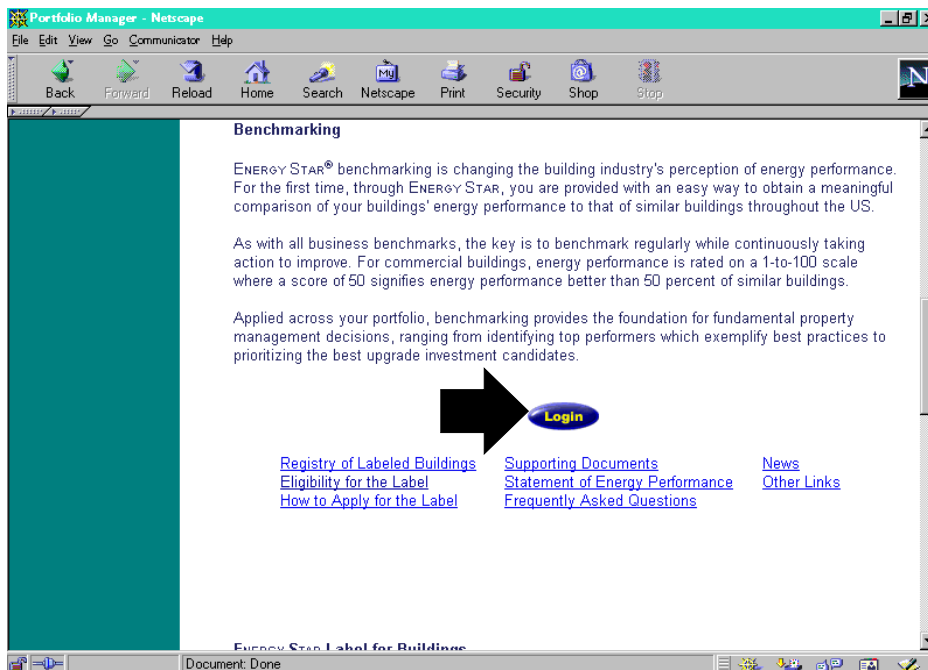


## Instructions and Tips for Using the Energy Star WEB Portfolio Manager

- 1) Collect your building information on the enclosed Information collection worksheet. Then go to the Energy Star WEB page at <http://yosemite1.epa.gov/estar/business.nsf/webmenus/Schools> and click on the “Benchmarking Your Building” link at the top left of the screen.



- 2) Both new users and those with existing accounts should click on the “Login” button to start using the benchmarking tool.



- 3) First try to login with the User Name and Password provided to you in the mailing. If the system does not recognize that account then click the “New User” button and fill in your information.

Portfolio Manager - Netscape

**Portfolio Manager**

EPA United States Environmental Protection Agency

Welcome to the Portfolio Manager, an environment for tracking energy performance and benchmarking buildings across your portfolio.

User Name:

Password:

Forget your password? To [request your password](#), please include your user name and/or the exact names of at least one of the buildings in the account.

If you are new to the Portfolio Manager and would like to see a demo or request a login please select one of the following options:

Read about the [system enhancements](#) (last updated 02/26/2001)

[http://kenrora.icfconsulting.com/portfolio/portfolio/Pm\\_Main.DisplayUpdatesPage](http://kenrora.icfconsulting.com/portfolio/portfolio/Pm_Main.DisplayUpdatesPage)

- 4) New Users need to fill in this screen to establish their account. Once you fill-in the information click the “Save” button at the bottom of the screen. Remember your User Name and Password!! Once the account is established then you will login using screen - see step 2 (above).

Netscape

**New User Information**

User Name:

Password:  Confirm Password:

Last Name:

First Name:  Prefix:

Title:

Organization:

Address:

City:  State:

Zip:

Phone:  Fax:

E-mail:

Please help us learn more about you to improve the functionality of this software:

What is the primary business or service of your organization?

☐ Owner/asset management

☐ Real estate management

Document: Done

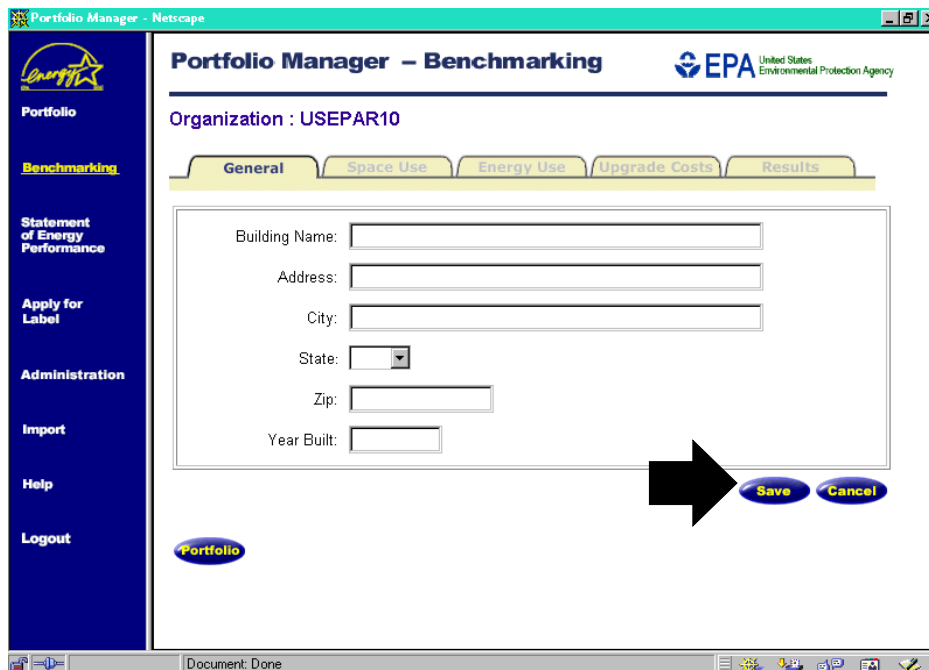
- 5) This shows a blank portfolio (with one sample building shown). If your building doesn't already appear here, click the "Add" button to start entering your building information.



The screenshot shows the "Portfolio Manager - Benchmarking" interface. The left sidebar contains links: Portfolio, Benchmarking, Statement of Energy Performance, Apply for Label, Administration, Import, Help, and Logout. The main content area displays the organization "USEPAR10" and a "Group" dropdown set to "All". A "Quick Assessment" link is visible. A table lists buildings, with one sample entry: "\*Sample Building For New User\*", "Chicago, IL", "200,000 sf", and "04-06-2001". A large black arrow points to a blue "Add" button.

Building	Location	Floor Space	Last Update
*Sample Building For New User*	Chicago, IL	200,000 sf	04-06-2001

- 6) Enter Info for your building information and click the "Save" button.



The screenshot shows the "Portfolio Manager - Benchmarking" interface with the "General" tab selected. The left sidebar is the same as in the previous screenshot. The main content area shows the organization "USEPAR10" and tabs for General, Space Use, Energy Use, Upgrade Costs, and Results. A form for building information includes fields for Building Name, Address, City, State (a dropdown menu), Zip, and Year Built. A large black arrow points to a blue "Save" button, with a "Cancel" button next to it.

Building Name:   
Address:   
City:   
State:   
Zip:   
Year Built:

- 7) Enter more information about your building and click the “Save” button.

**Portfolio Manager – Benchmarking** EPA United States Environmental Protection Agency

Organization : USEPAR10  
Building : z

General Space Use Energy Use Upgrade Costs Results

Total Building Area

Start Date	Floor Space	Vacancy
<input type="text"/>	<input type="text"/> sf	<input type="text"/> %

Save Cancel

- 8) Enter more information about your building. Please use only the “K-12 school” space definition as shown below. Select “K-12 School” and click the “Add” button.

**Portfolio Manager – Benchmarking** EPA United States Environmental Protection Agency

Organization : USEPAR10  
Building : x

General Space Use Energy Use Upgrade Costs Results

Space	Start Date	Floor Space	Vacancy
<a href="#">Building Area</a>	01-01-2000	10,000 sf	0%

Space Definitions:

K-12 School  
Select space type to add  
Office  
K-12 School  
Computer Data Center  
Open Parking Facility  
Unventilated Parking Garage(attached)  
Ventilated Parking Garage(unattached)  
Unventilated Parking Garage(unattached)  
Ventilated Parking Garage(attached)  
Higher Education  
Health Care  
Lodging  
Mercantile and Services  
Public Assembly

Add Graph



- 9) Enter more building information. Some of this information will be the same as the information you entered on the previous screens ("start date" and "floor space"). Click the "Save" button.

- 10) Click on the "Energy Use" tab to get to this screen. Begin entering Energy use data. Use your data collection worksheet to answer these questions.

In the "Rows to Add" fields select the number of data points you have for the first energy source (the example shows monthly billings for 12 months). In the "Start" field put in the date that the energy information you are recording begins. Then select the correct entry in the "Energy Type" field and select "New Meter" in the "Meter ID" field. Click the "Add" button.

- 11) Continue Entering energy use information for the first energy source. Click the “Save” button at the bottom of the page.

Portfolio Manager - Benchmarking

Organization : USEPAR10

Building : x

General Space Use **Energy Use** Upgrade Costs Results

Add Energy Use - Electricity:

Meter:

Units: kWh (thousand Watt-hours)

Start	End	Use	Unit	Cost
01-01-2000	01-31-2000		kWh	
02-01-2000	02-29-2000		kWh	
03-01-2000	03-31-2000		kWh	
04-01-2000	04-30-2000		kWh	
05-01-2000	05-31-2000		kWh	
06-01-2000	06-30-2000		kWh	
07-01-2000	07-31-2000		kWh	
08-01-2000	08-31-2000		kWh	
09-01-2000	09-30-2000		kWh	
10-01-2000	10-31-2000		kWh	

- 12) If you have additional energy sources repeat steps 11 and 12 for each source. A maximum of three sources is allowed.
- 13) Check the “Result” tab to see how your building scores! Then go back to the Energy Star Schools WEB page (see step 1) and see how to label your building if you scored 75 or above or use other resources to see how you can improve your building’s score.